

Please note that this record provides the statement of work (SOW) from the current contract to help enhance competition. This information should not be relied upon for proposal preparation. Contractors are cautioned to prepare their proposal in accordance with the SOW in the solicitation when it is released.

STATEMENT OF WORK

ENERGY STAR Hotline and Distribution Support

BACKGROUND

ENERGY STAR is a joint program of the U.S. Environmental Protection Agency (EPA) and the U.S. Department of Energy helping to save money and protect the environment through energy efficient products and practices.

In 1992 EPA introduced ENERGY STAR as a voluntary labeling program designed to identify and promote energy-efficient products to reduce greenhouse gas emissions. Computers and monitors were the first labeled products. Through 1995, EPA expanded the label to additional office equipment products and residential heating and cooling equipment. The ENERGY STAR label is now on more than 60 products including major appliances, office equipment, lighting, home electronics, and more. EPA has also extended the label to cover new homes and commercial and industrial buildings.

Through its partnerships with more than 17,000 private and public sector organizations, ENERGY STAR delivers the technical information and tools that organizations and consumers need to choose energy-efficient solutions and best management practices.

ENERGY STAR provides a trustworthy label for consumers. These products deliver the same or better performance as comparable models while using less energy and saving money. ENERGY STAR also provides easy-to-use home and building assessment tools so that homeowners and building managers can start down the path to greater efficiency and cost savings.

The ENERGY STAR website and Hotline are the public face of ENERGY STAR, and as such they are both critical components of ENERGY STAR's success.

The ENERGY STAR Hotline Contractor shall perform the following tasks:

Task	Estimated Quantity
Respond to calls, email, and letters from the public by providing accurate and timely answers. It is anticipated that the Hotline will receive, on average, 3,000 inquiries per month during months where tax credits are offered. If the majority of tax credits expire as planned at the end of 2010, calls per month are expected to drop to 2,000 per month.	3,000 per month Stats from previous 3 years is below.
Provide support for conferences and trade shows including the storage, management and upkeep of booths and equipment, and shipping conference materials.	30 events per year
Provide support for mailing out ENERGY STAR building decals.	5,000 per year
Commercial and Industrial Welcome Aboard Packages	1,000 kits per year
Submit a monthly report.	Once per month

Hotline	2007 Subtotal	2008 Subtotal	2009 Subtotal
Total Calls/Emails	21,759	22,909	33,309
Mnthly Ave Calls/Emails	1,813	1,909	2,776
Booth Sent	23	22	38
Plaques Sent	1,509	3,240	3,968

GENERAL REQUIREMENTS

A. Hours of Operation

The Contractor shall operate the Hotline, Monday through Friday, from 9:00 a.m. to 5:00 p.m. ET, excluding all Federal holidays except Veteran's Day. The Hotline shall remain open on Veteran's Day and shall be closed the day after Thanksgiving. Hotline staff shall be available during the above core hours to personally receive and respond to telephone calls, emails, and letters. The Contractor shall maintain a phone message system during off-hours that appropriately notifies callers that the Hotline is closed and they should call back during regular business hours. **Currently, the hotline does not allow callers to leave a message for a call back, but we may want to allow this option in the future.**

B. Telephone Service

The Contractor shall provide and maintain a telephone system that allows efficient access to the Hotline for all callers throughout the United States and the international community. The telephone system shall provide adequate lines to support all incoming telephone inquiries and provide automatic call distribution. The Contractor shall provide outgoing lines, but shall use the Government provided domestic long distance service, FTS 2000. The Government will also provide access to an international long distance carrier. The telephone system shall be capable of providing statistics on phone usage to include: number of calls received and answered, number of times all lines were busy, length of call, time waiting in queue, and abandoned calls while on hold. The telephone system shall reliably produce and maintain records which are sufficient to evaluate performance criteria including hourly, daily, weekly and monthly telephone statistics. The system shall be compatible with all telephone services paid for by the Government, including Government provided telephone lines and the FTS 2000 service. All systems and services must be reviewed and approved by the EPA Telecommunications Office and the Contracting Officer prior to acquisition.

The Contractor shall use FTS 2000 telephone service in accordance with EPA's Office of Information and Resources Management Policy Manual 2100, dated 12/21/94, Chapter 7, ATelecommunications@ for outbound domestic service. The Contractor will coordinate with EPA's FTS 2000 business office that will produce monthly reports on traffic analysis to the Hotline. EPA-provided FTS 2000 services shall be used for the conduct of official government business only.

C. Facilities and Equipment

The Contractor shall provide the facility to house the Hotline. The facility must be on-site or within 40 miles of CPPD Headquarters, 1310 L St., NW, Washington, DC 20005, and where the existing telephone number can be maintained.

The Hotline has a toll free number, 1-888-STAR-YES (1-888-782-7937).

D. Personnel

The Contractor shall provide necessary personnel to support the estimated call and email volume, the distribution of the ENERGY STAR plaques, and the ENERGY STAR booth. The Contractor shall ensure that all personnel assigned to work on this contract are qualified to perform the tasks outlined in this PWS. Technical staff shall be properly trained to provide timely, accurate, complete, and courteous responses using clear English. At least one staffer must be capable of communicating proficiently (both written and oral) in Spanish. All Hotline staff shall identify themselves at all times (both verbally and in writing) as Contractor personnel.

E. Training Materials

In order to properly answer Hotline calls, the Contractor shall train Hotline staff on ENERGY STAR. The ENERGY STAR web site and FAQs will serve as the primary source of material. Technical staff shall remain up-to-date on program status and emerging program and technical issues.

F. Performance Based

This is a Performance Based contract.

TASKS

TASK 1. ADMINISTRATIVE MANAGEMENT

For the duration of this contract, routine administrative tasks will be performed by the Contractor, including the preparation and review of Invoices/Progress Reports, budget analysis and management, and general work management.

TASK 2. COMMUNICATIONS AND MEETINGS

The Contractor shall communicate as necessary with the EPA Contracting Officer's Representative (COR) or EPA Task Manager (TM) in order to properly execute the tasks of this Statement of Work. The Contractor shall attend meetings and conference calls to obtain up-to-date information on program status and emerging program and technical issues as necessary. Most day-to-day communication will be done by phone and e-mail. In-person meetings will be held as needed.

TASK 3. MAINTAIN ENERGY STAR HOTLINE

The Contractor shall provide timely, accurate, and courteous responses to telephone, e-mail, and letter inquiries for information concerning ENERGY STAR. Responses shall be given directly by phone, through call-backs after researching answers, or by transferring callers to appropriate EPA or Contractor representatives.

Currently EPA/CPPD purchases, through a central EPA contract, Right Now software for our Frequently Asked Question (FAQ) database (www.energystar.gov/faqs), and to track responses to email questions. It is working quite well. If contractor proposes to use another system, the costs and benefits must be justified. If Contractor uses the Right Now software to track email questions, they will receive 10 user accounts. The Contractor must use its own system to track phone calls.

Contractor shall:

- Respond to all callers or emailers with at least a preliminary response within 24 hours.
- Possess a thorough understanding of ENERGY STAR's Web content and direct people to the Web for more information. ENERGY STAR Frequently Asked Questions (FAQ) should be used where applicable to ensure customers get consistent answers.
- Make recommendations, where applicable, for how to find additional materials and information available on www.energystar.gov.
- Make minor updates to the Frequently Asked Question database (Right Now system) including fixing typos, fixing hyperlinks, and copying the "question" into the subject area if it has been forgotten. These minor updates would be infrequent, not to exceed 15 minutes per week.
- Respond to partner requests for logo access and /or MESA (My ENERGY STAR Account) user-names and passwords.

The Contractor shall maintain a current list of technical subject-matter experts within EPA (including EPA Regions and Contractors) to consult when researching answers to technical questions, or for forwarding to subject-matter experts. The Contractor shall also maintain a current list of individuals and offices to which callers may be referred for responses to misdirected, legal, or highly technical questions. This list shall include EPA staff, other federal agencies, state and local governments, other Hotlines and information services.

To minimize the impact of recent significant call & email volume increase due to tax credits (in the 2009 American Recovery and Reinvestment Act), the Contractor shall implement a "Please Call" policy. Because answering a question on the phone is significantly less costly than responding by email, all unique tax credit questions should be handled on the phone. All email questions on tax credits (that do not already have an FAQ), will get an email response email asking them to "please call" the Hotline to discuss.

All inquiries from the press and Congress, except that seeking general background information about the program, shall be referred to the ENERGY STAR Communications Director.

ALL RESPONSES SHALL CONTAIN EPA-APPROVED INFORMATION. AT NO TIME SHALL THE Contractor STAFF RESPOND WITH OPINIONS, WHETHER THEY BE THE PERSONAL OPINIONS OF THE Contractor STAFF MEMBERS, THE OPINIONS OF THE Contractor AS A CORPORATE ENTITY, OR THE PERSONAL OPINIONS OF GOVERNMENT OFFICIALS OR REPRESENTATIVES WHO HAVE ASSISTED IN PROVIDING THE RESPONSE. Contractor STAFF SHALL BE ESPECIALLY ALERT TO ENSURE THAT OPINIONS CONCERNING EPA POLICY AND POLICY INTERPRETATIONS OF REGULATIONS ARE NOT A PART OF ANY RESPONSE TO PERSONS SEEKING ASSISTANCE. QUESTIONS IN THIS REGARD SHOULD BE ADDRESSED TO THE GOVERNMENT CONTRACT ADMINISTRATOR OR TECHNICAL REPRESENTATIVE.

TASK 4. SUPPORT FOR CONFERENCES AND TRADE SHOWS (CTS)

EPA attends numerous trade shows and conferences in order to increase awareness of ENERGY STAR programs. We have multiple booths – nine of which are housed at the Hotline (see Appendix B). The Contractor shall facilitate shipping these ENERGY STAR Exhibit Booths to these meetings. Requests should come through an email address (booths@energystar.gov) that will be forwarded directly to the Contractor.

The Contractor shall maintain the information of all ENERGY STAR equipment, including when it is scheduled to leave, where it is going, and when it is due back. All equipment shall be insured for its full value when being shipped. The Contractor shall communicate with all parties involved with the event to maintain information flow.

- The Contractor shall reconcile equipment and materials returned to the Hotline from events. Upon return, the Contractor shall inspect all items for damage and ensure that all parts have been returned. All missing items shall be immediately reported to the EPA COR or TM. If any damage is found due to shipping negligence, the Contractor shall prepare a claim against the shipper. Upon return of the booth to the Hotline, the Contractor shall remove all courier stickers (such as UPS or FEDEX labels), from the outside containers and perform routine maintenance (i.e. cleaning) on the booth. The Contractor shall notify the EPA COR when additional replacement materials (such as light bulbs or extension cords) are needed.

The Contractor shall report to EPA on past, present and future planned events and what equipment and materials are associated with each.

The Contractor shall mail the booths at their expense. Any shipments over the estimated quantity will be billed to the government.

TASK 5. SUPPORT FOR MAILING OUT ENERGY STAR BUILDING DECALS

EPA awards the ENERGY STAR building label for superior energy performance to buildings that score a 75% or higher using EPA's energy performance rating system (Portfolio Manager). Upon notification that EPA has approved a label application, the Contractor will mail the following to the "Mail To" Contact:

- decals
- original Congratulations Letter
- original Certificate of Achievement (in color)
- two marketing pieces

The Contractor shall provide an inventory status, via email, to EPA every Monday. As needed, the Contractor shall also participate in a weekly phone call with EPA and other contractors.

The Contractor shall mail the decals at their expense via regular U.S. mail. Any shipments over the estimated quantity will be billed to the government.

TASK 6. MONTHLY REPORTS

The Contractor shall deliver a monthly report to quantify and qualify all ENERGY STAR Hotline activity. The Contractor shall track and report Hotline activity by program and appropriate program subcategories. The Contractor shall track the content of the phone calls and emails to provide the EPA COR with detailed information that the public is requesting. This information shall be useful in helping program administrators to improve program content. The monthly report shall include the following information:

- Number of calls received and answered
- Number of times all lines were busy
- Average Length of calls
- Time waiting in queue
- Abandoned calls while on hold
- Category of inquiry with detail

- Number of Spanish callers and emails
- Number of Complaints – with detailed information about each complaint, and how it was resolved.
- Draft FAQs of any repeat questions that are not currently in the ENERGY STAR FAQ system, or suggest modifications to current FAQs (average 2 draft FAQs per month)
- Number of questions referred to EPA and Contractor staff
- Number of ENERGY STAR building plaques mailed
- Number of Exhibit Booth mailed out, and which ENERGY STAR branch sponsored the booth.

TASK 7. Welcome Aboard Packages for the Commercial and Industrial Branch

The Contractor shall send out "Welcome Aboard Kits" to new ENERGY STAR Commercial and Industrial partners. It is anticipated that there will be about 400 new partners per year and approximately 1,000 kits will be mailed out.

EPA will design the kit which will consist of a letter and other materials. There will be a generic kit, and potentially sector-specific materials. EPA will provide samples of the generic kit as well as two color inserts and any sector-specific materials. EPA will provide a PDF file of the welcome letter. The Contractor will make black and white copies of the welcome letter.

EPA will supply the mailing envelopes, mailing labels and return address labels. In addition, EPA will supply a mailing list in MS Excel on a weekly basis. The contractor shall generate address labels from the Excel file, insert the appropriate materials and mail kits on a weekly basis via regular mail U.S. mail.

The mailing shall be completed within no more than two days of receipt of mailing list. The contractor shall provide EPA with a weekly Excel file of the kit mail outs.

Deliverable:

The Monthly Report shall be delivered by the tenth (10th) day of the next month.